

# Course Material

## ERPNext

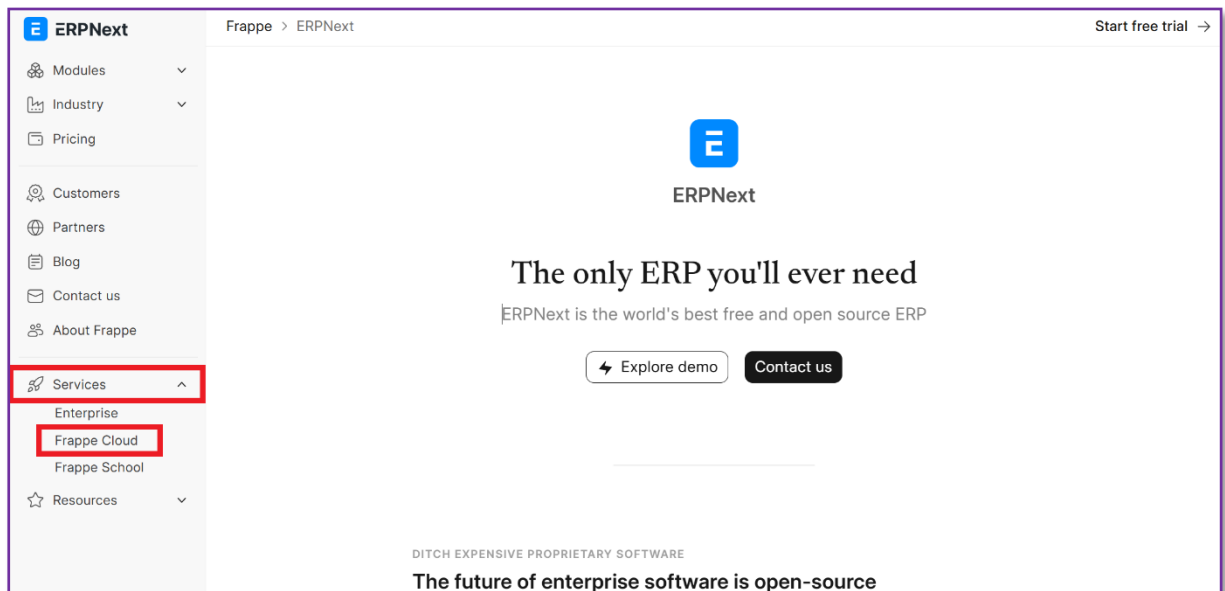
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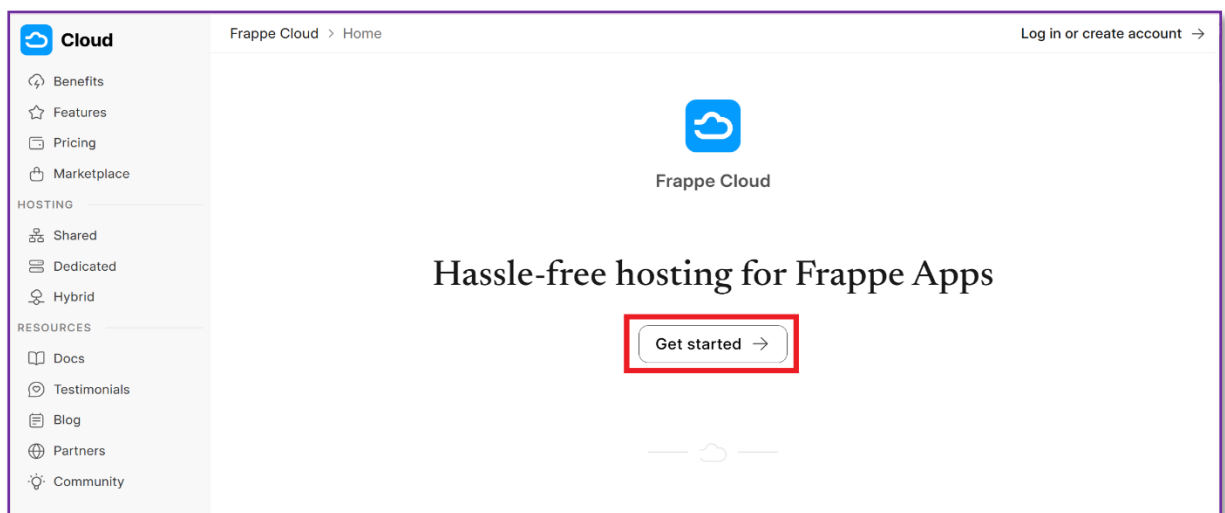
### Installation

#### Sign Up/Log In:

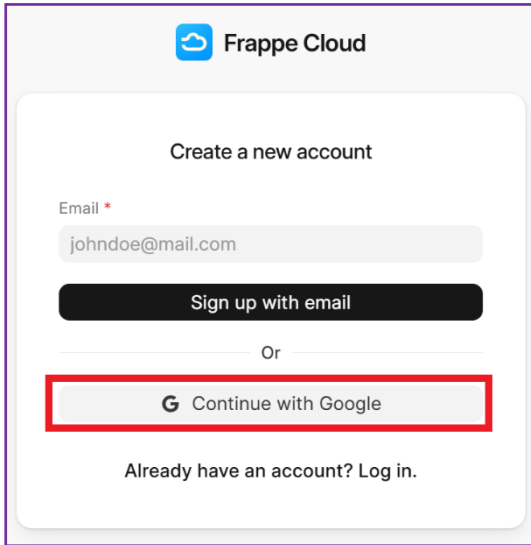
1. Go to <https://frappe.io/erpnext>
2. Click on **Services** → **Frappe Cloud**.



3. Click on **Get started**.

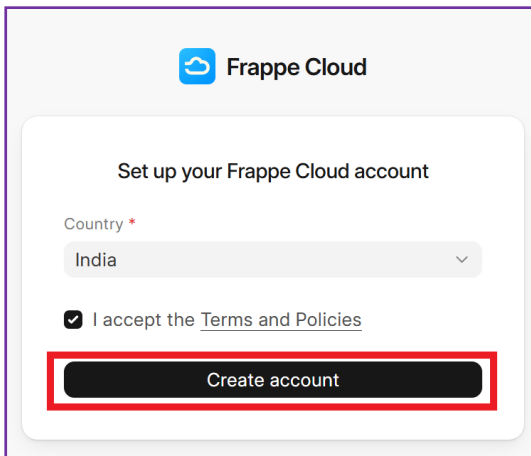


- Click on **Continue with Google** to create a Frappe Cloud account using your Google ID.



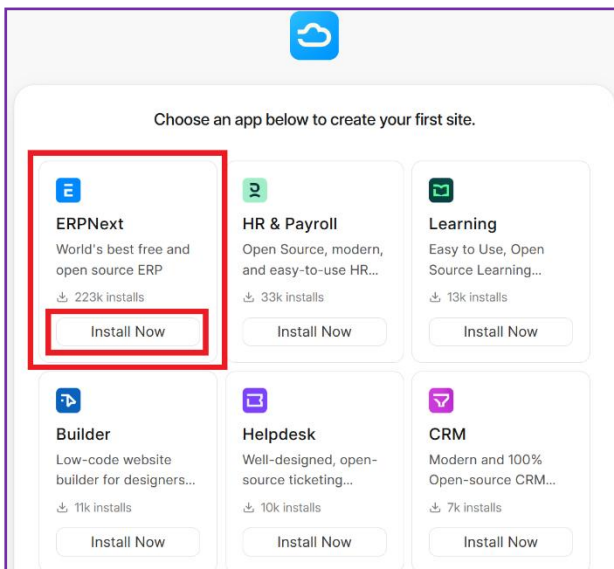
The screenshot shows the Frappe Cloud account creation interface. At the top is the Frappe Cloud logo. Below it, the heading "Create a new account" is centered. There is an "Email \*" input field containing "johndoe@mail.com". Below this is a black "Sign up with email" button. A horizontal line with the word "Or" in the center separates this from the "Continue with Google" button, which is highlighted with a red rectangular box. At the bottom, there is a link that says "Already have an account? Log in."

- Click on **Create account** and follow the steps to set up your ERPNext account.



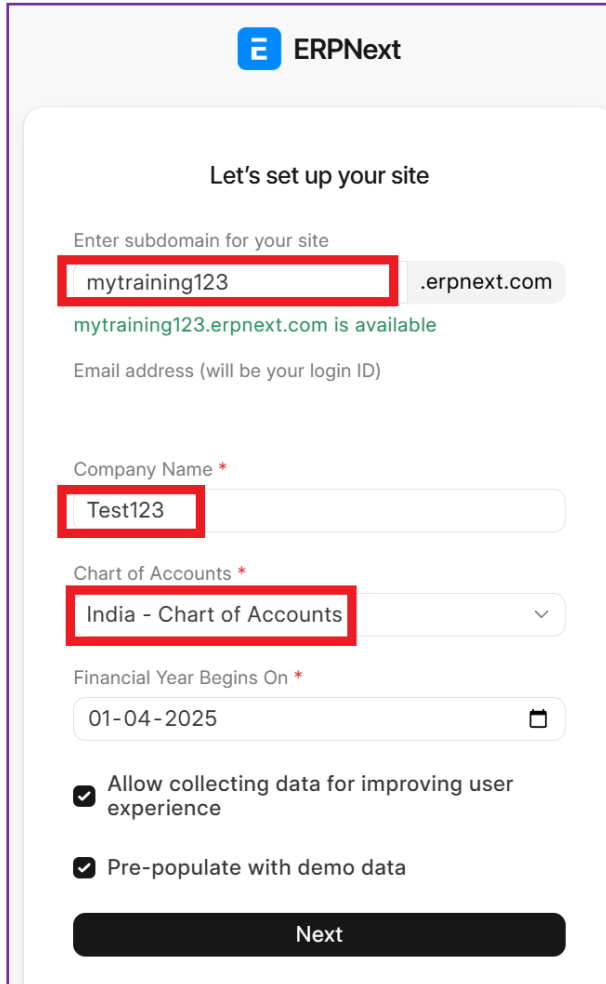
The screenshot shows the Frappe Cloud account setup interface. At the top is the Frappe Cloud logo. Below it, the heading "Set up your Frappe Cloud account" is centered. There is a "Country \*" dropdown menu with "India" selected. Below this is a checkbox labeled "I accept the Terms and Policies", which is checked. At the bottom, the "Create account" button is highlighted with a red rectangular box.

**Step 1: Choose ERPNext and click on Install Now.**



The screenshot shows the Frappe Cloud app selection interface. At the top is the Frappe Cloud logo. Below it, the heading "Choose an app below to create your first site." is centered. There are six app cards displayed in a 2x3 grid. The first card, "ERPNext", is highlighted with a red rectangular box. It includes the text "World's best free and open source ERP", "223k installs", and an "Install Now" button, which is also highlighted with a red rectangular box. The other cards are "HR & Payroll", "Learning", "Builder", "Helpdesk", and "CRM", each with their own descriptions, install counts, and "Install Now" buttons.

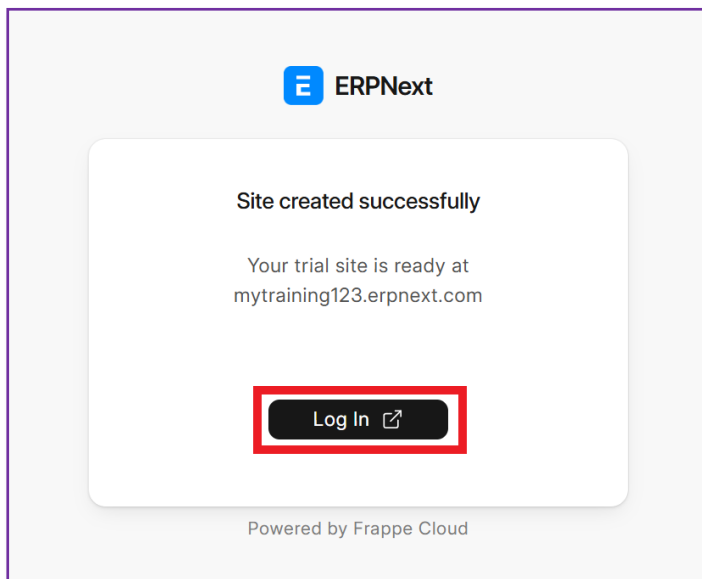
**Step 2:** Choose a subdomain name for your site and ensure its availability. Use your organization or institution name as the company name. Select **India – Chart of Accounts** and set the financial year beginning date. Click **Next** after updating the details.



The image shows the ERPNext site creation form. The form is titled "Let's set up your site". It contains the following fields and options:

- Enter subdomain for your site:** A text input field with "mytraining123" entered. To its right is a button labeled ".erpnext.com". Below this, a green message states "mytraining123.erpnext.com is available".
- Email address (will be your login ID):** An empty text input field.
- Company Name \*:** A text input field with "Test123" entered.
- Chart of Accounts \*:** A dropdown menu with "India - Chart of Accounts" selected.
- Financial Year Begins On \*:** A date picker showing "01-04-2025".
- Checkboxes:** Two checkboxes are checked: "Allow collecting data for improving user experience" and "Pre-populate with demo data".
- Next:** A large black button at the bottom.

**Step 3:** Click on **Log In** once the site is successfully created.

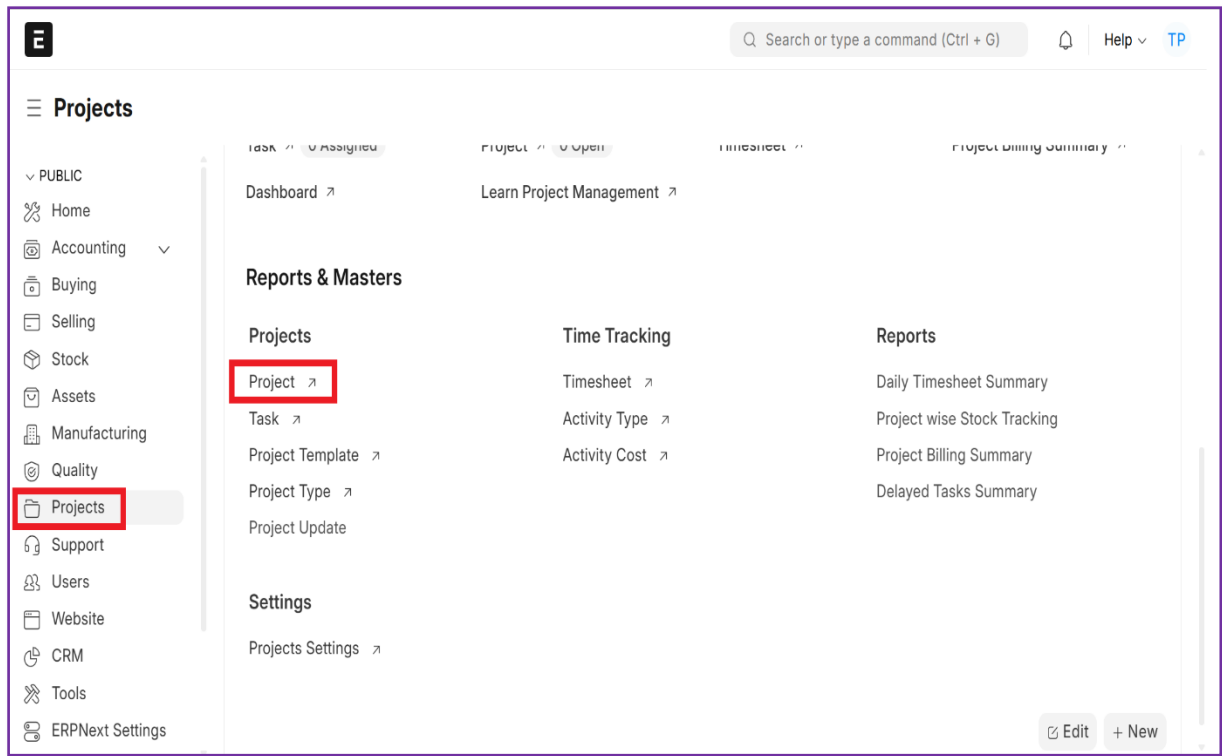


The image shows the ERPNext site creation success screen. It contains the following elements:

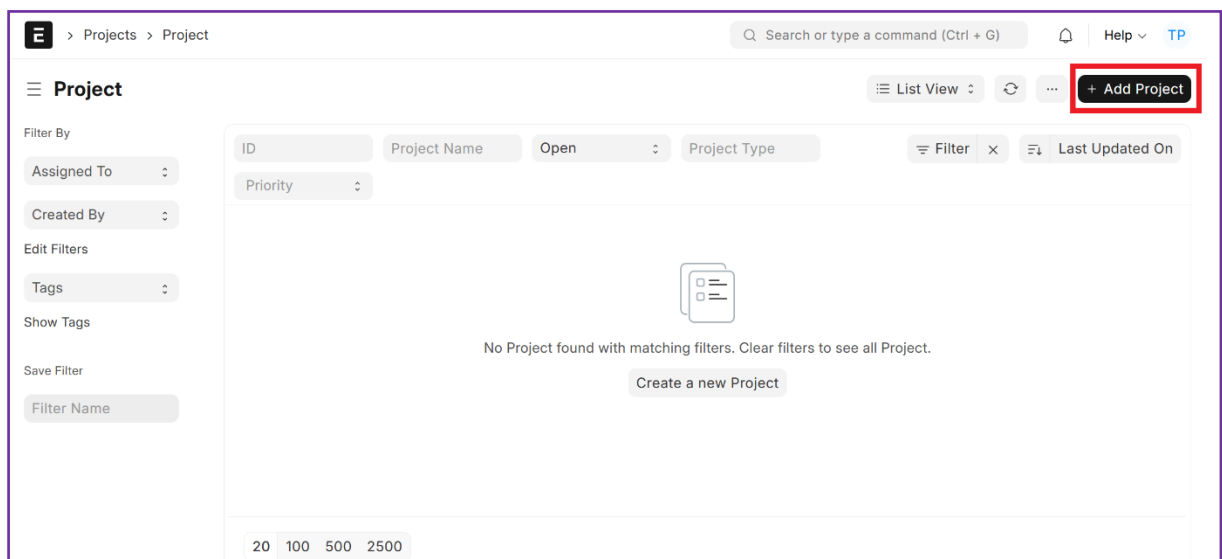
- Site created successfully:** A heading at the top.
- Your trial site is ready at mytraining123.erpnext.com:** A message in the center.
- Log In:** A black button with a white "Log In" text and an external link icon, highlighted with a red box.
- Powered by Frappe Cloud:** A footer text at the bottom.

## ERPNext – User Guide

1. ERPNext dashboard will launch. Click on **Projects** and scroll down to select **Project** under **Reports & Masters**.



2. Click on + **Add Project** to create a new project. Enter the desired project name and click on **Edit Full Form** to add more details. Enter the required details and click on **Save** to create the project.



New Project

Series \*

PROJ-.####

Project Name \*

PROJ-Test

From Template

Company \*

Test123

Edit Full Form

Save

Projects > Project > New Project

Search or type a command (Ctrl + G)

Help TP

New Project Not Saved

Save

Series \*

PROJ-.####

Project Name \*

PROJ-Test

Status

Open

Project Type

Internal

Is Active

Yes

% Complete Method

Task Completion

From Template

Expected Start Date

07-04-2025

Expected End Date

24-04-2025

Priority

Medium

Department

Marketing

3. Click on the **+** beside **Task** to create new tasks under the project.

PROJ-Test Open

Actions View < > Save

See on Website

Assigned To +

Attachments +

Tags +

Share +

0 0 FOLLOW

You last edited this · just now

You created this · just now

Activity ^

APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR

Mon

Wed

Fri

This is based on the Time Sheets created against this project

Connections ^

Project

Task +

Timesheet +

Issue +

Material

Material Request +

BOM +

Stock Entry +

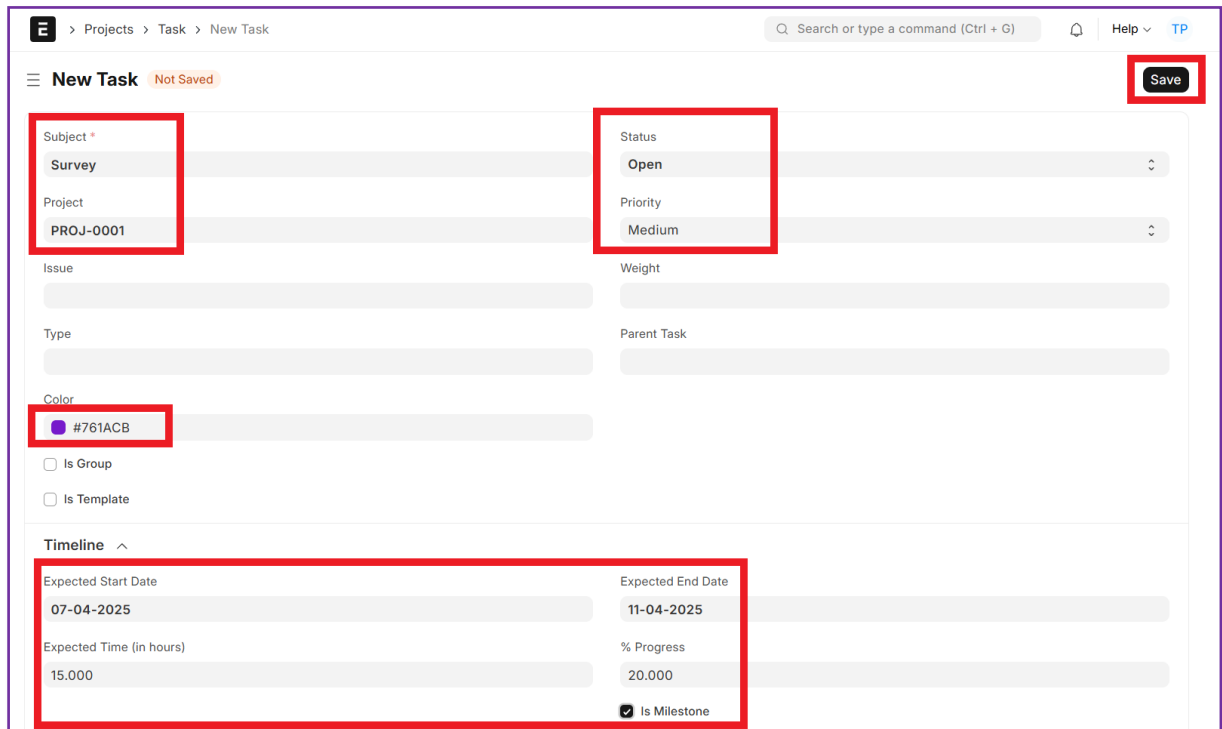
Sales

Sales Order +

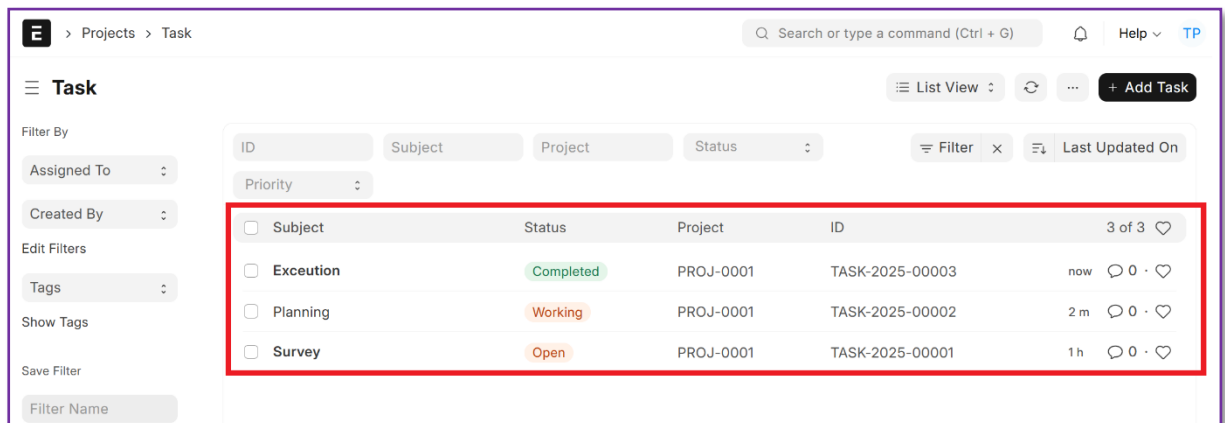
Delivery Note +

Sales Invoice +

4. Create a new task named Survey or any desired name, enter the required details, and click **Save**. Assign a color to each task to make differentiation easier.



5. Go to <https://mytraining123.erpnext.com/app/task> and create additional tasks such as Working (In-Progress) and Completed.



ID	Subject	Project	Status	Priority	Last Updated On
TASK-2025-00003	Execution	PROJ-0001	Completed	Low	now
TASK-2025-00002	Planning	PROJ-0001	Working	Medium	2 m
TASK-2025-00001	Survey	PROJ-0001	Open	Medium	1 h

6. Click on **List View** to quickly access **Gantt**, **Kanban**, and **Calendar** views, and more. These views provide an instant overview of the entire project.

**Task**

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

ID Subject Project Status

Priority

Subject Status Project ID

Execution Completed PROJ-0001 TASK-2025-00001

Planning Working PROJ-0001 TASK-2025-00002 7m

Survey Open PROJ-0001 TASK-2025-00001 1h

List View Report View Dashboard View Gantt View Kanban View Calendar View Tree View

+ Add Task

**Task Gantt**

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

ID Subject Project Status

Priority

Expected Start Date

April

06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

Survey (TASK-2025-00001)

Planning (TASK-2025-00002) - 40%

Execution

**Test**

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Open Working Pending Review Overdue Template

+ Add Task

Survey

Planning

**Task Calendar**

Calendar

Select Calendar

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Calendar View

April 2025

SUN MON TUE WED THU FRI SAT

30 31 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 1 2 3

Survey

Planning

Execution

7. Go to the ERPNext homepage and click on **Help** → **Documentation** to access all available resources, including tutorials and guides.

